Attorney Heather H. Kruthers (for Public Guardian, Conservator of the Estate)

Petition for Authorization and Instruction as to Management of Conservatee's Estate Assets (Authority to Invest Funds)

	ont. from 04211 0216	6,	
	Aff.Sub.Wit.		
<b>&gt;</b>	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation	<u> </u>	
	FTB Notice		

**PUBLIC GUARDIAN**, Successor Conservator of the Estate appointed on 7/5/1995, is Petitioner.

~Please Petition for details~

Declaration of Deputy Public Guardian Clint Yarbrough Regarding Investment of Assets filed 6/1/2016. NEEDS/PROBLEMS/COMMENTS:

#### Continued from 6/2/2016.

Minute Order states continued for review of the late-filed information.

Note for reference: Probate Code § 2570(d) for authorization of investments provides the court may require such proof of fairness and feasibility of [the investment) as the court determines is necessary. Probate Code § 2574 provides the conservator, without authorization of court, may invest funds of the estate [in enumerated types of investments, which appear to describe the proposed investment for Conservateel; 2574(b) provides that in making the investments, the conservator shall take into consideration the circumstances of the estate. indicated cash needs, and, if reasonably ascertainable, the date of the prospective termination of the conservatorship. The Order Settling Sixteenth Account of the Conservatorship filed 2/1/2016 shows a balance of cash of \$226,946.09.

Reviewed by: LEG
Reviewed on: 6/13/16
Updates:
Recommendation:

File 1- Hernandez

#### Tony G. Martinez (Estate) 2 Atty

Case No. 10CEPR00563

Kruthers, Heather H. (for Public Administrator – Successor Administrator)
Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

	dios freding ke. Fallore to the a this Account of Felling	
DOD: 4-3-99		NEEDS/PROBLEMS/
		COMMENTS:
		OFF CALENDAR
Cont. from 010314,		
40414, 101014,		First/Final Acct filed
070915, 111915,		6/9/16 is set for 7/21/16
031716		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		<b>Reviewed on:</b> 6/13/16
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 2 – Martinez

# 3 Alexis Cedano, Victor Cedano, Gabriel Cedano, Noah Cedano, Jayden Cedano, Reyna Cedano, Victoria Cedano, Jonah Cedano (GUARD/P) Case No. 11CEPR00795

Petitioner: Jennifer Cedano (pro per)

#### **Petition for Visitation**

	JENNIFER CEDANO, mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	RAUL PALLARES, JR. paternal cousin, was appointed as guardian of Noah	This petition is as to NOAH and GABRIEL only.
Cont. from 040716  Aff.Sub.Wit.  ✓ Verified  Inventory  PTC  Not.Cred.  Notice of X  Hrg	and Gabriel on 11/16/11  Please see petition for details.	Continued from 4/7/16. Minute order states examiner notes handed in open court; continued for proper service as to the guardian and the minors. As of 6/10/16 the following issues remain:  1. Need Notice of Hearing.
Aff.Mail X Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video		<ol> <li>Need Proof of service of the Notice of Hearing on:         <ul> <li>Raul Pallares, JR. (guardian)</li> <li>Noah Cedano (minor)</li> <li>Gabriel Cedano (minor)</li> </ul> </li> </ol>
Receipt CI Report 9202 Order X Aff. Posting Status Rpt UCCJEA Citation FTB Notice		Reviewed by: KT Reviewed on: 6/14/16 Updates: Recommendation: File 3- Cedano

# 4 Robert J. Johansen (CONS/PE)

Case No. 11CEPR01121

Attorney Catherine A. Amador (for Linda K. Babcock, Conservator of the Estate)

Probate Status Hearing Re: Receipt of Distribution

DOD: 2/22/2014		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR
Cont. from		Receipt on Distribution filed 6/6/2016.
Aff.Sub.Wit.		6/6/2016.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting	_	Reviewed by: LEG
Status Rpt		Reviewed on: 6/14/16
UCCJEA	_	Updates:
Citation	_	Recommendation:
FTB Notice		File 4- Johansen

5 Steven R. Thomas Family Trust 5-13-03 Case No. 12CEPR00674

Attorney Salazar, Steven F. (for Trustee Steven R. Thomas, II)

Attorney Bagdasarian, Gary G. (for former Co-Trustee Kristy Helm Thomas)

Petition for Settlement of First and Final Account, Approval of Trustee Acts and Distribution of Trust Assets and Attorneys' Fees and Costs

DOD: 1/19/12		STEVEN R. THOMAS, II, Trustee, is	NEEDS/PROBLEMS/COMMENTS:
		Petitioner.	
			Minute Order 5/9/16: The Court
		Account period: 11/1/12 - 2/29/16	indicates that it will not require a
Co	nt. from 050916	Accounting: \$178,342.19	special needs trust and that the
	Aff.Sub.Wit.	Beginning POH: \$169,217.03 Ending POH: \$107,054.01	submitted order should say that the acts
_		Ending POH. \$107,034.01	are not approved or ratified; continued for direct notice to the minors.
Ě	Verified	<b>Petitioner states</b> Pursuant to Order	for direct notice to the minors.
	Inventory	Approving Settlement Agreement	Note: All notice and other issues noted
	PTC	entered 6/25/13, the following	have been removed. Proposed order
	Not.Cred.	parties are entitled to receive a one-	contains language that Petitioner's
~	Notice of	eighth share of the trust estate:	acts/transactions are not approved.
	Hrg	Steven R. Thomas, II	
>	Aff.Mail W	Kristi Helm-Thomas	Note: The Court will set a status hearing
	Aff.Pub.	Kelby Renee Helm (a minor)	for <u>Thursday</u> , <u>July 28</u> , <u>2016</u> for the filing
	Sp.Ntc.	Michael Garrett Davis (a minor)	of the receipts for blocked accounts.
	Pers.Serv.	Steven Ernest Helm, III (a minor)     Steven Boy Thomas (a minor)	
	Conf.	<ul><li>Steven Rex Thomas (a minor)</li><li>Jackson Alan Thomas (a minor)</li></ul>	
	Screen	Alexis Leigh Thomas (a minor)	
	Letters	7 Hoxis Loigh Hiomas (a million)	
	Duties/Supp	<b>Preliminary distributions:</b> Pursuant to	
		the settlement agreement,	
	Objections Vista	preliminary distributions were made	
	Video	as follows:	
	Receipt	Kristi Helm-Thomas: \$4,000.00	
	CI Report	• Steven R. Thomas II: \$4,816.95	
	9202	(reimburse for funeral expenses)	
~	Order	Property Districted During	
	Aff. Posting	<b>Property Disbursed:</b> During administration, Kristi Helm-Thomas	Reviewed by: skc
	Status Rpt	and Steven Thomas, II disbursed to	Reviewed on: 6/13/16
	UCCJEA	themselves or on their behalf and/or	Updates:
	Citation	retained in their possession certain	Recommendation:
	FTB Notice	personal property, which is to be	File 5- Thomas
		allocated towards their distributive	
		shares as set forth in the petition. (List	
		includes certain inventoried assets,	
		reimbursement for expenses, etc.)	
		SEE ADDITIONAL PAGES	
<u> </u>		JLL ADDITIONAL FAGES	

#### Steven R. Thomas Family Trust 5-13-03 Case No. 12CEPR00674

#### Page 2

5

**Attorney Salazar: \$10,774.50** (\$10,000.00 plus \$774.50 in costs)

Declaration filed 3/28/16 provides itemization of 82.65 hours @ \$250/hr, totaling \$20,662.50 for services from 1/25/12 to 3/13/16 as attorney for Trustee Steven R. Thomas, II; however, attorney is willing to accept \$10,000, plus \$774.50 in costs.

**Attorney Bagdasarian: \$9,563.00** (\$9,362.00 plus \$201 in costs)

Declaration filed 2/16/16 provides itemization of 51.1 hours and separately 23.8 hours @ \$250/hr for services from 2/6/12 through 6/27/13 as attorney for Kristy Helm-Thomas, former Co-Trustee.

**Attorney Helon: \$5,535.00** (\$5,100.00 plus \$435 in costs)

Itemization at Exhibit D reflects total fees incurred of \$10,207.65 as GAL for certain minor beneficiaries; however, attorney is willing to accept \$5,100, plus \$435 in costs.

Closing: \$1,500.00

#### **Proposed Distribution:**

- Steven R. Thomas II: \$3,507.81 (\$12,389.89 less advance/retained assets of \$8,882.08)
- Kristi Helm-Thomas: \$1,834.42 (\$12,389.89 less advance/retained assets of \$10,555.47)
- Kelby Renee Helm (minor): \$12,389.88, to be placed into a blocked account
- Steven Ernest Helm, III (minor): \$12,389.88, to be placed into a blocked account
- Michael Garrett Davis (minor): \$12,389.88, to be placed into a blocked account
- Steven Rex Thomas (minor): \$12,389.88, to be placed into a blocked account
- Jackson Alan Thomas (minor): \$12,389.88, to be placed into a blocked account
- Alexis Leigh Thomas (minor): \$12,389.88, to be placed into a blocked account

Pursuant to the Settlement Agreement, and to avoid the expenses of guardianship of the estate, Petitioner requests that the shares of minor beneficiaries be deposited into blocked accounts at EECU subject to withdrawal upon majority. See Amendment filed 5/12/16 for details.

**Note:** The proposed orders provide for distribution to blocked accounts for the minor beneficiaries, payable when each minor reaches majority, pursuant to the settlement agreement.

#### **SEE ADDITIONAL PAGES**

#### Page 3

5

#### Petitioner requests an Order:

- 1. Finding that all facts stated in the Petition are true and correct and that all notices required by law have been duly given;
- 2. Finding that the Court has received full disclosure regarding the relationship between Marvin T. Helon, Guardian ad Litem, and Steven E. Helm, III, Steven Rex Thomas, Jackson A. Thomas, and Alexis L. Thomas, minors, and with regard to all matters related to the petition there is no conflict of interest; such Guardian ad Litem has adequately represented the minors as to all matters regarding the Petition; and general family benefits will accrue to the living members if (sic) the family of the minors upon the grating of the Order.
- 3. That this account and report be settled, allowed and approved, and all acts and transactions of Petitioner relating to matters set forth therein be ratified, confirmed and approved;
- 4. That the property of the trust estate be distributed as set forth therein;
- 5. That Attorney Steven F. Salazar for Petitioner/Trustee Steven R. Thomas II be allowed compensation for his services and costs of \$10,774.50;
- 6. That Attorney Gary D. Bagdasarian for former Co-Trustee Kristy Helm-Thomas be allowed compensation for his services and costs of \$9,563.00;
- 7. That Attorney Marvin T. Helon, Guardian ad Litem for minors Steven E. Helm, III, Steven Rex Thomas, Jackson Alan Thomas, and Alexis Leigh Thomas, be allowed compensation for his service and costs of \$5,535.00;
- 8. That the sum of \$12,389.88 to each of the minors, namely, Kelby Renee Helm, Michael Garrett Davis, Steven E. Helm III, Steven Rex Thomas, Jackson Alan Thomas, and Alexis Leigh Thomas, representing each's one-eighth (1/8) share of the trust estate be deposited separately in the name of said minor in an interest-bearing account at EECU in Fresno. No part of the money so deposited shall be withdrawn except on order of the Court until said minor reaches majority, after which all money shall be paid to the minor without further order of the Court;
- 9. That Petitioner be allowed to withhold \$1,500 from distribution for purposes of paying closing costs of Administration and as a reserve for liabilities of the Trust, with any unexpended portion to be distributed to the beneficiaries in fractional interests without further order of the Court;
- 10. Terminating the trust and discharging petitioner from his duties and responsibilities as trustee upon acknowledgment of receipt by beneficiaries or on their behalf; and
- 11. Such other and further orders be made as this Court may deem proper under the circumstances.

#### 6 Attorney

# Jennifer Roberts (Special Needs Trust) Teixeira, J. Stanley (for Trustee Christina Roberts)

Case No. 12CEPR00751

Second Account and Report of Trustee of Jennifer Roberts Special Needs Trust; Petition to Settle Account; and for Allowance of Fees to Attorney

			CHRISTINA ROBERTS, Trustee, is	NE	EDS/PROBLEMS/COMMENTS:
			Petitioner.		
			Account period: 11/6/13 – 12/31/15 Accounting: \$233,535.25 Beginning POH: \$233,535.25	1.	Need clarification: Why is the trust being charged an extra \$7.50 bank fee for each court-ordered
	Aff.Sub.Wit.		Ending POH: \$217,083.52		withdrawal beginning in 2014?
>	Verified		(cash held in blocked account)		
	Inventory		Two sales as year in a second and a second and	2.	On 6/17/15, the Court authorized
	PTC		Trustee waives compensation.		the beneficiary's share of her father's estate to be distributed to
	Not.Cred.		Attorney: \$3,000.00 (for 12.7 hours @		the special needs trust. The Order
~	Notice of		\$275/hr, less discount, per declaration		for Final Distribution entered
	Hrg		and itemization at Exhibit B)		7/8/15 in 12CEPR00290 Estate of
~	Aff.Mail	W	Cooks #//F FO (filing a soulification of		Michael Roberts authorized
	Aff.Pub.		Costs: \$665.50 (filing, certification, per Exhibit C)		distribution of cash and a one- half interest in real property to the
	Sp.Ntc.		Extilion C)		beneficiary. This accounting does
	Pers.Serv.		Attorney: \$1,661.00 (for legal services		not reflect receipt of such
	Conf.		associated with the establishment of a		distribution. Need clarification.
	Screen		conservatorship of the person for the		
	Letters		beneficiary, 4.9 hours @ \$275/hr, less		te: If granted, the Court will set a
	Duties/Supp		discount, plus costs of filing, certification, per declaration and	II .	itus hearing for the filing of the rd Account as follows:
	Objections		itemization at Exhibit D.)	•	Thursday, March 1, 2018
	Video				,,,,
	Receipt		Petitioner prays for an order:		
<b>.</b>	CI Report		Finding notice of hearing given as		
<u> </u>	2620		required by law;		
_	Order		Approving, allowing, and settling the account and report as filed;		• • • • • • • • • • • • • • • • • • • •
-	Aff. Posting		Authorizing payment of attorney		viewed by: skc
<b> </b>	Status Rpt		fees related to the Special Needs		viewed on: 6/14/16
	UCCJEA Citation		Trust;		dates: commendation:
-	FTB Notice		4. Authorizing payment of attorney		e 6- Roberts
	I IB NOIICE		costs related to the Special Needs	riit	e o- kopelis
			Trust; 5. Authorizing payment of attorney fees and costs associated with the conservatorship matter; and 6. For such other relief as the Court deems proper.		
<u> </u>			чень рюры.		

Petitioner/mother Evoniesha Smith (pro per) Guardian Adriana Brewer (pro per)

#### **Probate Status Hearing RE: Visitation**

		<b>EVONIESHA SMITH</b> , mother, petitioned	NEEDS/PROBLEMS/COMMENTS:
		the court to terminate the guardianship.	
		Minute order dated 12/3/16 denied the	Continued from 12/3/16. Minute
		petition for termination. This status	order states the Court orders the
	ont. from 082015,	hearing was set re: visitation.	visitation for Evoniesha Smith be
	0315	ADRIANA BREWER, non-relative, was	increased and should include
<del></del>	Aff.Sub.Wit.	appointed guardian on 9/11/14. –	holiday time. The Court feels that every weekend would be
	Verified	present in court on 4/23/15.	appropriate, and Ms. Smith initially
	Inventory	Minute order dated 4/23/15 states the	indicates that every weekend in
	PTC	Court states its intent to give Ms. Smith	difficult as she lives in Los Angeles, but later agrees. Parties state they
	Not.Cred.	the opportunity to establish more regular and frequent visitation. The	are able to mutually agree as to the
	Notice of	Court orders visitation for Ms. Smith on	increased time. Each party is to
	Hrg	the first weekend of the month, from	keep track separately of the time
	Aff.Mail	Friday at 1 p.m. thru Sunday at 1 p.m.	spent in visitation. The Court orders
	Aff.Pub.	Ms. Smith is to pick the minor up at	that the Court Investigator is to re- interview the parties in May and
	Sp.Ntc.	Adriana Brewer's home, and Ms. Brewer is to pick the minor up from Ms. Smith's	provide the court an update for the
	Pers.Serv.	home. Parties may mutually agree to	6/16/16 hearing.
	Conf.	an alternative weekend and are	-
	Screen	admonished to obey these orders.	
	Letters		
	Duties/Supp	Declaration of Evoniesha Smith filed on	
	Objections	7/31/15 states she has done all her visits with her daughter like the judge order	
	Video	her to. She has attached proof of the	
	Receipt	visits and pictures of Kylie with her	
	CI Report	brother, sisters and mother.	
<u> </u>	9202	<u> </u>	
<b> </b>	Order	Minute order dated 8/20/15 states the	
_	Aff. Posting	Court orders visitation increased to	Reviewed by: KT
	Status Rpt	every other weekend, beginning 8/25/15, from Friday at 2 p.m. thru	Reviewed on: 6/10/16
<b> </b>	UCCJEA	Sunday at 2 p.m. Parties are to meet in	Updates:
<b> </b>	Citation	Bakersfield a the bus depot to	Recommendation:
	FTB Notice	exchange the minor.	File 7 – Smith
		Court Investigator Samantha Henson's	
<u> </u>		Report filed on 6/14/16	

Attorney

8

Fanucchi, Edward L. (for Executor JoAnn DiRedo)

#### Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 12/20/13	JOANN DIREDO was appointed Executor with	NEEDS/PROBLEMS/COMMENTS:
	Full IAEA without bond on 7/10/14.	
	╡	Minute Order 1/7/16: Counsel
	At the hearing on 7/10/14, the Court set this	represents there is no cash in
Cambial frame	status hearing re the filing of the first account	the estate and the sale has
Cont'd from	or petition for final distribution.	been cancelled; requests 4
091015, 010716	=	months due to impending
Aff.Sub.Wit.	Note: Final 1&A filed 5/29/15 reflects a total	litigation.
Verified	estate value of \$2,550,000 consisting of various	Charles Dan and Charles 1 / /2 4 /2 /
Inventory	real property interests.	Status Report filed 6/14/16 states on due to unforeseen
PTC	Status report filed 9/9/15 states in response to a	circumstances, the buyers
Not.Cred.	rejected creditor's claim, David Allen DiRedo	backed out of the sale and
Notice of	filed a Complaint for Breach of Contract	escrow fell through. \$5,000
Hrg	Money Had and Received Declaratory Relief	remains on deposit with the
Aff.Mail	on 3/30/15 against the estate. The case is	title company and there is a
Aff.Pub.	currently in litigation. (Note: See claim filed	dispute as to who gets that
Sp.Ntc.	= 8/19/14 for \$106,846.46) In addition, escrow	amount. A new listing
Pers.Serv.	has just been opened on the real property located on West Shaw. Therefore, the estate is	agreement was signed and the property is still on the
Conf.	not in a condition to be closed. Attorney	market. No further offers have
Screen	Fanucchi requests continuation for at least four	come in. All expenses are
Letters	months to complete the sale and continue	being paid by the executor,
Duties/Supp	with the litigation pending against the estate.	and she is currently exploring
Objections		options to pay fees and costs.
Video	Status Report filed 12/8/15 states the complaint	Attorney Fanucchi therefore
Receipt	filed by David Allen DiRedo in 15CECG01036 is currently in the process of litigation. Regarding	requests continuance of at least three months to resolve
CI Report	the property: Escrow was scheduled to close	the issues stated above.
9202	on 11/30/15; however, due to unforeseen	
Order	circumstances, escrow was put on hold and	1. Need first account or
	the sale is now in jeopardy. The property was	petition for final
	taken off the market back in September when	distribution.
Aff. Posting	the offer was originally accepted and	Reviewed by: skc
Status Rpt	therefore, due to failure of the escrow to close,	Reviewed on: 6/13/16
UCCJEA	a new listing and re-marketing has begun.	<b>Updates:</b> 6/14/16
Citation	Currently the estate is not in a condition to be	Recommendation:
FTB Notice	closed due to the pending lawsuit and the	File 8- DiRedo
	pending sale of the real property. Therefore, it	
	is requested that this status hearing be	
	continued for no less than 4 months to	
	complete the sale and continue the litigation.	
<u>'</u>		8

# 9 Margaret Stever (Estate)

Case No. 14CEPR00593

Attorney Gleason, Mark J. (for Robert Bruce Stever – Administrator)

Probate Status Hearing Re: First Account and Final Distribution

DOD: 10/20/1999	ROBERT BRUCE STEVER, was appointed as Administrator	NEEDS/PROBLEMS/COMMENTS:
	with full IAEA authority, without bond on 08/14/2014.	OFF CALENDAR.
	Letters issued on 08/15/2014.	Petition for First Account
Cord from 101515	=	
Cont. from 101515, 012116	Final Inventory and Appraisal filed 09/04/2014 shows an	filed 05/31/2016.
Aff.Sub.Wit.	estate valued at \$125,000.00.	Hearing is set for
Verified	Minute Order of 08/14/2014 set this status hearing for	<u>07/07/2016.</u>
Inventory	the filing of the First Account and/or Final Distribution.	
PTC	<b>=</b>	1. Need First Account or
Not.Cred.	Status Report filed 01/07/2016 states the estate cannot	Petition for Final Distribution.
Notice of	be distributed and closed at this time because the estate does not have sufficient cash and it is the wish of	
Hrg	all heirs to sell the property before distributing the	
Aff.Mail	estate. It is still the desire of the Petitioner and both of	
Aff.Pub.	the heirs to sell the real property before distributing the	
Sp.Ntc.	estate, one-third of which will be distributed to the decedent's husband's estate filed under case no.	
Pers.Serv.	14CEPR00594. The heirs do not wish to co-own real	
Conf.	property. Petitioner has been unable to sell the real	
Screen	property but has repeatedly reduced the price	
Letters	according to the advice of the realtor. Petitioner listed	
Duties/Supp	the real property for sale with a broker in March of 2015,	
Objections	for \$428,795 and has reduced the price four times. On approximately January 4, 2016, the price was reduced	
Video	to \$305,000.00. Petitioner is optimistic that this price	
Receipt	reduction will result in an offer. Finally, there is no cash	
CI Report	in this estate or the Estate of Robert Stever, sufficient to	
9202	pay reimbursement to Petitioner for his out-of-pocket	
Order	expenses paid on behalf of both estates or statutory costs of administration, including the attorney's	Parisured by a 11/
Aff. Posting	advanced costs. Petitioner has expended a	Reviewed by: LV Reviewed on: 06/14/2016
Status Rpt UCCJEA	substantial sum out of his personal funds to have a well	Updates:
Citation	drilled on real property in the Estate of Robert Stever for	Recommendation:
FTB Notice	which there is no cash in the estate to reimburse him.  The sale of this real property will enable petitioner to	File 9 – Stever
	proceed with enough cash to pay costs of	
	administration in both estates.	
	Petitioner requests that the Court set another status	
	hearing out at least 120 days.	

# 10 Robert Benton Stever (Estate)

Case No. 14CEPR00594

Attorney Gleason, Mark J. (for Robert Bruce Stever – Administrator)

Probate Status Hearing re: First Account and/or Final Distribution

DOD: 03/04/2014		ROBERT BRUCE STEVER, was appointed as Administrator	NEEDS/PROBLEMS/COMMENTS:
		with full IAEA authority, without bond on 08/14/2014.	
		Letters issued on 08/15/2014.	OFF CALENDAR.
	nt. from 101515, 2116	Final Inventory and Appraisal filed 09/10/2014 shows an estate valued at \$508,000.	Petition for First Account filed 05/31/2016.
	Aff.Sub.Wit.	estate valued at \$500,000.	Hearing is set for
	Verified	Status Report filed 01/07/2016 states the estate cannot	07/07/2016.
	Inventory	be distributed and closed at this time because the	<u>0770772010.</u>
	PTC	estate is to receive distribution from the este of the	
	Not.Cred.	Decedent's predeceased spouse, Margaret Stever, which has been filed under case no. 14CEPR00593,	2. Need First Account or
	Notice of	heard concurrently with this Report. It is further the	Petition for Final Distribution.
	Hrg	desire of the Petitioner and both of the heirs that the	
	Aff.Mail	Dockery real property be sold during the Probate	
	Aff.Pub.	administration. The heirs do not wish to co-own real	
	Sp.Ntc.	property. Based on the information and belief, the deed of trust issue raised in the prior status report filed in	
	Pers.Serv.	this matter will be resolved during escrow proceedings	
	Conf.	upon the sale of the Dockery property. Further, the	
	Screen	existing well on the Dockery property went dry and it	
	Letters	was necessary to dig a new well, which is now	
	Duties/Supp	complete. The real property needs to be sold to pay the costs of the new well and the costs of	
	Objections	administration. Petitioner requests that the Court set	
	Video	another status hearing out at least 120 days.	
	Receipt		
	CI Report		
	9202	4	
	Order Aff. Posting	4	Reviewed by: LV
	Status Rpt	4	<b>Reviewed by:</b> LV <b>Reviewed on:</b> 06/14/2016
	UCCJEA	-	Updates:
	Citation	1	Recommendation:
	FTB Notice	1	File 10 – Stever
_		п	

Attorney

Kruthers, Heather H. (for Public Guardian)

#### Probate Status Hearing RE: Filing First Account

	PUBLIC GUARDIAN was appointed	NEEDS/PROBLEMS/COMMENTS:
	as Conservator of the Estate on	
	1/15/15.	OFF CALENDAR
	At the beginning on 1/15/15 the	First/Final Account filed 6/15/16 is set for
Cont. from 031016	At the hearing on 1/15/15, the Court set this status hearing for	7/26/16
Aff.Sub.Wit.	the filing of the first account.	
Verified		
Inventory	Status Report filed 2/19/16 states	
PTC	the Public Guardian is short- staffed and therefore requests	
Not.Cred.	continuance for at least 90 days.	
Notice of		
Hrg	_	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order	4	
Aff. Posting	4	Reviewed by: skc
Status Rpt	4	Reviewed on: 6/13/16
UCCJEA	4	Updates: 6/15/16
Citation	4	Recommendation:
FTB Notice		File 11- Skopec

# 12 Jessie Dobson (Estate)

Case No. 15CEPR00146

Attorney: James H. Vallis (for Wanda Jones – Executor)

#### Probate Status Hearing RE: First or Final Account

DOD: 01/23/2015		WANDA JONES was appointed	NEEDS/PROBLEMS/COMMENTS:
		executor with full IAEA without bond on	
		4/16/2016.	1. Need first account, petition for
		1	final distribution or current written
	ont. from	Letters issued 5/4/2015.	status report pursuant to Local
	Aff.Sub.Wit.	Le A filed on //E/2015 shows the estate	Rule 7.5, which states in all
-		I&A filed on 6/5/2015 shows the estate valued at \$200,000.00	matters set for status hearing verified status reports must be
	Verified	(real property).	filed no later than 10 days before
	Inventory		the hearing. Status reports must
	PTC	Minute order dated 4/16/2015 set this	comply with the applicable code
	Not.Cred.	status hearing for filing the first or final	requirements. Notice of the status
	Notice of	account.	hearing, together with a copy of
	Hrg		the status report shall be served
	Aff.Mail		on all necessary parties.
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: SEF
	Status Rpt X		<b>Reviewed on:</b> 6/13/2016
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 12- Dobson

# 13 Michael Daniel Lutz (Estate) Case No. 15CEPR00667

Attorney Rindlisbacher, Curtis D. (for John F. Lutz – Executor)

Probate Status Hearing RE: Filing of the Inventory and Appraisal

	Trobate states fleating KE. Filling of the life	
DOD: 4/18/15	JOHN F. LUTZ, Brother, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Executor with Full IAEA without bond on	
	08/13/2015.	Minute Order of 04/07/2016: Counsel
		represents that the inventory is
	Letters issued on 8/13/15.	completed; requests 60 days for
Cont. from 040716		appraisement of several properties.
Aff.Sub.Wit.	Minute Order 02/11/2016 set this Status	No appearance is necessary at the
Verified	Hearing for filing of the Inventory and	status hearing if the Inventory and
Inventory	Appraisal.	Appraisal is filed a least two Court
PTC	Minute Order 02/11/2016 states the Order to Show Cause is vacated. No	days prior.
Not.Cred.	appearance is necessary at the status	Need Inventory and Appraisal or
Notice of	hearing if the Inventory and Appraisal is	current written status report
Hrg	filed at least two court days prior.	pursuant to Local Rule 7.5 which
Aff.Mail	]	states in all matters set for status
Aff.Pub.		hearing verified status reports
Sp.Ntc.		must be filed no later than 10
Pers.Serv.		days before the hearing. Status
Conf.		Reports must comply with the
Screen		applicable code requirements.
Letters		Notice of the status hearing,
Duties/Supp		together with a copy of the Status
Objections		Report shall be served on all
Video	]	necessary parties.
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		<b>Reviewed on:</b> 06/14/2016
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 13- Lutz
		12

Attorney: Edward R. Ramirez (for David Figueroa – Executor)

#### Probate Status Hearing RE: Filing of the Inventory and Appraisal

Prodate status hearing kt: riling of the inventory and Appraisal				
DO	D: 7/30/2015		DAVID FIGUEROA, nephew, was	NEEDS/PROBLEMS/COMMENTS:
			appointed Executor with full IAEA	
			authority without bond on 12/17/2015.	
$\vdash$				
_			Letters issued 12/17/2015.	OFF CALENDAR
Со	nt. from 05121	6		Verified status report signed by
	Aff.Sub.Wit.		Minute order dated 12/17/2015 set this	fiduciary filed 6/6/2016, states Partial
	Verified		status hearing for the filing of the	no. 1 I&A filed 2/22/2016 represents
	Inventory		inventory and appraisal.	the complete and final I&A.
✓	inveniory		,	'
1	PTC		Partial no. 1 inventory and appraisal	
			was filed 2/22/2016 - \$200,000.00.	
	Not.Cred.		·	
	Notice of		<b>Status report filed 5/9/2016</b> states the	
	Hrg		Partial no. 1 inventory and appraisal	
1	Aff.Mail	w/	filed 2/22/2016 represents the final	
		,	inventory of the assets of the estate.	
	Aff.Pub.		Minute order dated 5/12/2016 states	
	Sp.Ntc.		counsel is admonished that his client	
	Pers.Serv.		must sign the I&A. No appearance is	
	Conf.		necessary on 6/16/2016 if the signed	
	Screen		I&A ([status report] is filed at least two	
	Letters		court days prior.	
			Coon adys phon	
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			Reviewed by: SEF
1	Status Rpt			Reviewed on: 6/13/2016
╠╫	UCCJEA			Undates
	Citation			Updates:  Recommendation:
	FTB Notice			File 14- Reyes

#### Attorney Susan K. Arthur (for Petitioner Florencio Levario)

#### Petition to Determine Succession to Real Property and Personal Property

DC	D: 12/29/2015		FLORENCIO LEVARIO, brother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
			40 days since DOD.	Continued from 5/9/2016 per request of counsel.
<u></u>	ont. from 05091		40 days since bob.	<b>Note:</b> Amended Attachment
	Aff.Sub.Wit.	S/ P	No other proceedings.	14 filed 6/10/2016 lists the name and date of death of
✓	Verified		No offici proceedings.	Decedent's spouse as LUPE LEVARIO deceased on
✓	Inventory		I & A - \$117,500.00	9/11/1998, while the Declaration of Clerical Error
	PTC			filed 6/10/2016 lists the date of
<b>√</b>	Notice of		Will dated 2/7/1991 devises the residue of the	death of sister-in-law LOLA OROSCO also as 9/11/1998.
<b>√</b>	Hrg Aff.Mail	W/	estate to the Petitioner.	However, the Petition contains a hand-written date of death
	Aff.Pub.			of <u>6/29/1977</u> , apparently for
	Sp.Ntc.		Petitioner requests Court determination that	Decedent's spouse, <b>LUPE</b>
	Pers.Serv.		Decedent's <b>100%</b> interest in real property	<b>LEVARIO</b> . Court may require confirmation of the dates of
	Conf. Screen		located at 1401 Hoag Street, Sanger, and Decedent's <b>100%</b> interest in personal property,	death of these two persons.
	Letters		passes to the Petitioner pursuant to Decedent's Will.	
	Duties/Supp		Decederii 3 Wiii.	
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 6/13/16
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 15- Levario

## 16 Renate Lina Swanson (CONS/PE)

Case No. 16CEPR00364

Attorney: Zepure "Zeppy" Attashian (for Petitioner, Michelle Ryan)

Attorney: Leigh W. Burnside (for proposed conservatee Renata Swanson)

#### Petition for Appointment of Probate Conservator of the Person and Estate

	AAICUELLE DVAN dougletor is NEEDS /DOOD FAAS /COAAAENTS.			
			MICHELLE RYAN, daughter, is	NEEDS/PROBLEMS/COMMENTS:
			petitioner and requests appointment as conservator of the person and	Court Investigator Advised Rights
			estate	on 6/7/16.
			33.3.3	
Со	nt. from 05191	6	Please see petition for details.	1. Need Citation
	Aff.Sub.Wit.			
1	Verified		Court Investigator Report filed on	2. Need proof of personal service
	Inventory		6/9/16	of the Citation along with a
	PTC			copy of the petition on Renata Lina Swanson.
	Not.Cred.			Lii id 344di isori.
<b>-</b>	Notice of			3. Notice of Hearing on all
✓	Hrg			relatives within the 2 <sup>nd</sup> degree
	Aff.Mail	W/O		was not sent with a copy of the
<b> </b>		,,,		petition as required.
	Aff.Pub.			4. Petition requests 2690 powers
	Sp.Ntc.			without listing which powers are
	Pers.Serv.			being requested and why.
✓	Conf.			Local Rule 7.15/2.
_	Screen			
✓	Letters			5. Petitioner is requesting no bond
1	Duties/Supp			or reduced bond. Petitioner states she does not have the
É	Objections			financial means to obtain a
	Video			bond as required by Probate
✓	Receipt			Code §2320 or C.R.C. 7.207(c).
1	CI Report			if bond is required it should be
<b> </b>	-			set at \$2,272,800.00.
	9202			6. Order is incomplete. Need new
✓	Order			completed order.
				Completed diddi.
				Please see additional page
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 6/14/16
	UCCJEA			Updates:
	Citation	Χ		Recommendation:
	FTB Notice			File 16- Swanson
				1.6

#### 16 Renate Lina Swanson (CONS/PE) Case No. 16CEPR00364

**Note:** If the petition is granted, status hearings will be set as follows:

- Wednesday, July 27, 2016 at 9:00 a.m. in Department 303, for the filing of the bond, if required.
- **Wednesday, October 26, 2016** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- Wednesday, August 23, 2017 at 9:00 a.m. in Department 303, for the filing of the first account. \

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

# 17 Ranulfo Esteban Tapia (Estate)

Case No. 16CEPR00370

Attorney: Edward L. Fanucchi (for Rogelio Tapia – Administrator)

Probate Status Hearing Re: Proof of Bond

DOD: 12/29/2010	ROGELIO TAPIA, son, was appointed	NEEDS/PROBLEMS/COMMENTS:
	administrator with full IAEA with	
	\$80,000.00 bond on 5/12/2016.	
		OFF CALENDAR
Cont. from	Bond of \$80,000 filed 5/12/2016.	Bond filed 5/12/2016.
Aff.Sub.Wit.	Letters issued 5/23/2016.	
Verified		
Inventory	Minute order dated 5/12/2016 set this	
PTC	status hearing re: proof of bond.	
Not.Cred.		
Notice of	]	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202	_	
Order	1	
Aff. Posting	_	Reviewed by: SEF
Status Rpt	1	<b>Reviewed on:</b> 6/13/2016
UCCJEA	1	Updates:
Citation	1	Recommendation:
FTB Notice		File 17- Tapia

# 18 Rodrigo Rene Pino (GUARD/P)

Case No. 16CEPR00418

Petitioner: Silvia Carillo Espinoza (Pro per – Maternal grandmother)

Petitioner: Jose Luis Martinez Maravilla (Pro per – Maternal step-grandfather)

#### Petition for Appointment of Guardian of the Person

			TEMPORARY EXPIRES 6/16/16	NEEDS/PROBLEMS/COMMENTS:
Co	nt. from Aff.Sub.Wit. Verified		SILVIA CARILLO ESPINOZA and JOSE LUIS MARTINEZ MARAVILLA, maternal grandmother and maternal stepgrandfather, are petitioners  Court Investigator report filed 6/9/2016.	Item 10 of petition requests to excuse notice to Rembernto Pino (maternal grandfather). Need proof of service at least 15 days before the hearing of Notice of Hearing with copy of petition or consent and waiver of notice or
	PTC Not.Cred. Notice of		See petition for details.	declaration of due diligence for:  a. Rembernto Pino (maternal grandfather) –  unless court dispenses with
<b>/</b>	Hrg			notice.
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.	 		
✓	Pers.Serv.	w/		
<b>✓</b>	Conf. Screen			
1	Letters			
1	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
<b>√</b>	Order			
	Aff. Posting			Reviewed by: SEF
<b>✓</b>	Status Rpt UCCJEA			Reviewed on: 6/14/2016 Updates:
	Citation			Recommendation:
	FTB Notice			File 18- Pino

Petitioner

Kim, Chinda (Pro Per – Sister – Petitioner)

#### Petition for Appointment of Probate Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
				Court Investigator advised rights on 6/1/16
				Voting rights affected – need minute
	Aff.Sub.Wit.			order.
~	Verified			
	Inventory			
	PTC			
	Not.Cred.			
~	Notice of			
	Hrg			
<u> </u>	Aff.Mail	W		
	Aff.Pub.			
-	Sp.Ntc.			
~	Pers.Serv.	W		
~	Conf.			
<u> </u>	Screen			
~	Letters			
~	Duties/Supp			
	Objections			
~	Video			
	Receipt			
~	CI Report			
	9202			
<u> </u>	Order			D. C. Line L.
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 6/14/16
-	UCCJEA			Updates:
<del> </del>	Citation			Recommendation:
L	FTB Notice			File 19- Kim

Attorney

Herold, Kim M. (for Patrick W. Enrico – Trustee – Petitioner)

#### Petition to Determine Succession to Real Property

DO	D: 11/16/07		PATRICK W. ENRICO, Trustee of the John	NEEDS/PROBLEMS/COMMENTS:
			D. Enrico 1989 Living Trust, is Petitioner.	
			40 Days since DOD	
	Aff.Sub.Wit.	S/P	No other proceedings	
~	Verified	0/1	I&A: \$142,500.00 (a 50% separate	
-	Inventory		property interest in certain real property in	
	PTC		Firebaugh)	
	Not.Cred.		Will date d 10/00/02 desires assistant of	
_	Notice of		Will dated 12/28/93 devises residue of estate to the Trustee of the John D. Enrico	
	Hrg		1989 Living Trust.	
~	Aff.Mail	W	9	
	Aff.Pub.		Petitioner requests Court determination	
	Sp.Ntc.		that the decedent's 50% separate property interest in certain real property in	
	Pers.Serv.		Firebaugh passes to him as Trustee of the	
	Conf.		John D. Enrico 1989 Living Trust pursuant	
	Screen		to the decedent's will.	
	Letters			
	Duties/Supp			
	Objections			
	Video			
-	Receipt			
	CI Report			
_	9202			
Ě	Order			Poviowed by: skc
	Aff. Posting Status Rpt			Reviewed by: skc Reviewed on: 6/14/16
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 20- Enrico

Case No. 16CEPR00479

Petitioner

Lonzo Brown (CONS/P)
Brown, Bobbiette (Pro Per – Daughter – Petitioner)

Petition for Appointment of Probate Conservator of the Person

			See netition for details	NEEDS /DDODLEAS /
-			See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
				COMMENTS.
-				CONTINUED TO 8/1/16
				Per Petitioner request
	A # 6 1 14#1			<u>-</u>
	Aff.Sub.Wit.			Need continuance for
~	Verified			advisement of rights and
	Inventory			investigation per Probate Code §§ 1823, 1826.
	PTC			Code 33 1023, 1020.
	Not.Cred.			2. Need video receipt per
~	Notice of			Local Rule 7.15.8.A.
	Hrg			
~		W		
	Aff.Pub.			
	Sp.Ntc.			
~		W		
	Conf.			
	Screen			
~	Letters			
~	Duties/Supp			
	Objections			
		Х		
	Receipt			
		Χ		
	9202			
~	Order			
<u> </u>	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 6/14/16
	UCCJEA			<b>Updates:</b> 6/15/16
~	Citation			Recommendation:
	FTB Notice			File 21- Brown

#### Attorney

Robirda M. Lyon (for Petitioners Phyllis Taylor and Barbara Ester, daughters)

#### Petition to Determine Succession to Real Property

	D 11/10/1001		PHYSIC TAYLOR - DARRADA FOTER	,
DC	D: 11/18/1991		PHYLLIS TAYLOR and BARBARA ESTER,	NEEDS/PROBLEMS/COMMENTS:
			daughters, are Petitioners.	1 Itam 9/a) of the Potition is
Co	ont. from		40 days since DOD.	1. Item 9(a) of the Petition is incomplete as to (3) re: issue of a predeceased child. –Declaration filed
<b>√</b>	Aff.Sub.Wit. Verified		No other proceedings.	6/15/2016 states there is no issue of a predeceased child.
✓	Inventory			
	PTC		I & A - <b>\$35,000.00</b>	
	Not.Cred.		100,000.00	
	Notice of Hrg	N/A		
	Aff.Mail		Decedent died intestate.	
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.		Petitioners request Court determination	
	Conf.		that Decedent's <b>100%</b> interest in real property located at 657 W. Parlier, Reedley,	
	Screen		passes to the Petitioners at <b>50%</b> to each	
	Letters		pursuant to intestate succession.	
	Duties/Supp			
-	Objections			
	Video Receipt			
	CI Report			
	9202			
1	Order			
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 6/14/16
	UCCJEA			<b>Updates:</b> 6/15/16
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 22- Bailey

Attorney: Robirda M. Lyon (for Margaret Ann Baker)

#### Petition to Determine Succession to Real Property

DC	D: 7/7/2009	MARGARET ANN BAKER, daughter, is	NEEDS/PROBLEMS/COMMENTS:
		petitioner	
		40 days since DOD	Continued to 7/27/2016
Со	nt. from	No other proceedings	@ request of counsel
	Aff.Sub.Wit.	I&A - \$135,000.00	
✓	Verified	Will dated 8/25/1997 devises all of	1. Item 9a(1) of petition lists a
✓	Inventory	decedent's estate to Margaret Ann  Baker.	deceased spouse. Need date of death of deceased spouse,
✓	PTC		pursuant to Local Rule 7.1.1D.
	Not.Cred.		2. Need original will to be
	Notice of	Petitioner requests Court determination that decedent's 100% interest in real	deposited, pursuant to
	Hrg	property located at 37784 Sharewood	Probate Code 8200.
	Aff.Mail	Lane, Squaw Valley CA (including a	
<u> </u>	Aff.Pub.	mobile home), pass to her in its entirety,	
	Sp.Ntc.	pursuant to decedent's will.	
	Pers.Serv.	=	
	Conf. Screen		
	Letters	=	
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202	_	
✓	Order		
	Aff. Posting		Reviewed by: SEF
	Status Rpt		<b>Reviewed on:</b> 6/14/2016
	UCCJEA		Updates: 6/15/2016
	Citation	_	Recommendation:
	FTB Notice		File 23- Woodward

Amador, Catherine A. (for Petitioner Ruth Jacobsen)

#### Petition for Relief From Breach of Trust

DOD: 1/17/14	<b>RUTH JACOBSEN,</b> Beneficiary, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
Aff.Sub.Wit.	Petitioner states JOSEPHINE M. KIRK (Jo) is successor trustee and is in breach of fiduciary duties of loyalty, to exercise proper care and skill, to keep beneficiaries informed, to follow trust's instructions, and to account.	Note: Page B is the First and Final Account filed 5/11/16 by Josephine M. Kirk, Trustee.
Inventory PTC Not.Cred.  Validation Aff.Mail Aff.Pub. Sp.Ntc.	Rudy A. Biglione (Ms. Biglione or Mother) had four children: Ruth Jacobsen, Josephine M. Kirk (Jo), Joyce A. Brenden, and Christian M. Petersen (Chris). Starting in approx. 1998, Jo resided with Ms. Biglione in her residence in Clovis. Family members agreed that it would be a good thing for Jo and their mother to reside together. Ms. Biglione was in good health at the time and required no assistance until much later. Jo provided the assistance she	1. Debra Lee Scheidt, granddaughter, is named as second successor trustee and is therefore entitled to notice pursuant to Probate Code §17203. Need continuance for
Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Objections  Video Receipt  CI Report  9202	gradually came to need.  The trust provided a distribution plan for after Ms. Biglione's death to her children, including that the trustee may defer distribution of the trust for a period not exceeding six months after the settlor's death, and gave Jo an option to purchase the residence at the date of death value, to be exercised no later than two months after the settlor's death. The trust also required the trustee to account at least annually, at termination, and on change of trustees.	proper notice to Ms. Scheidt or waiver.  2. Josephine M. Kirk was served "c/o" attorney Ruth Lind. Need direct notice to Ms. Kirk pursuant to Probate Code §1214 and Cal. Rule of Court 7.51.
Order X  Aff. Posting Status Rpt UCCJEA Citation	Ms. Biglione passed away 1/17/14. Petitioner states she requested a copy of the trust from Jo when she was in Clovis for the funeral. Jo refused to provide it at that time, claiming it was too emotional. Ruth contacted Jo every few months to renew her request. Jo consistently refused to provide a copy	3. Need order. Local Rule 7.1.1.F.  Reviewed by: skc  Reviewed on: 6/14/16  Updates:  Recommendation:
FTB Notice	of the trust for a year, claiming the documents were too long, that it was too much trouble to copy, she did not have to provide them and was not going to do so, and hung up the phone. Jo continued to reside in the residence as though it was her right and refused to discuss the matter.  SEE ADDITIONAL PAGES	File 24A- Biglione

#### 24A The 1998 Rudy A. Biglione Revocable Trust Case No. 16CEPR00483

#### Page 2

**Petitioner states** in January 2015, Ruth called the attorney who had drafted Ms. Biglione's estate plan to request copies for herself and Chris. Attorney Ruth P. Lind was not aware that Ms. Biglione had passed away. She asked Ruth to provide the request in writing; however, it got lost in the mail. When Ruth called again to explain the delay, Ms. Lind stated, "I cannot talk to you" and hung up on her. Ruth mailed the written request again.

Ruth then hired her own attorney, who also wrote and requested a copy of Ms. Biglione's estate plan, and explained that Ruth and Christ did not object to Jo buying out their interests in their mother's house, but that it was not appropriate for Jo to have remained there for more than a year without paying rent.

In February 2015, Jo informed Ruth that she intended to exercise the option to purchase the residence.

In April 2015, Jo finally provided information regarding the trust assets at Ms. Biglione's death and confirmed her intent to purchase the residence, and that Joyce would participate in the purchase.

However, she did not obtain a date of death value for the residence to set the purchase price. Instead, she obtained an estimate from a realtor and proposed that number, \$202,000, as the purchase price.

Jo also claimed she was entitled to reimbursement for \$47,520 in lost wages plus an unspecified amount of retirement she would have earned, plus \$166,400 for 16 years of caring for their mother since 1998. Petitioner incurred attorney's fees addressing these claims by Jo, which were not authorized by the trust.

Joyce had moved into the residence with Jo in spring or summer of 2014. Escrow was to close in late September; however, Joyce backed out of the deal, and without her participation, Jo could not obtain the loan. On 9/3/15, Jo allegedly served notice of her intention to sell the residence on the trust beneficiaries; however, notice was not received by Jo or Chris until after it was on the market. Jo did not consult with the other beneficiaries about the listing price and did not keep them informed of the escrow or sale. Ruth incurred additional attorney fees trying to obtain information about it, and only learned the sale had closed on 10/8/15 from public records.

Petitioner states Jo listed the house for sale at \$202,000. The residence received multiple offers and sold over the asking price. Ruth believes it was listed below market value and the trust lost income it would otherwise have received had it been priced properly.

Petitioner states she requested an account and plan for distribution on 10/20/15 and again on 11/9/15. On 11/20/15, Jo provided what purported to be a full account for the period 1/17/14 through 11/13/15; however, it contained inaccuracies and omissions. See petition for details. On 12/1/15, Ruth objected to the incomplete account and requested additional information.

#### **SEE ADDITIONAL PAGES**

#### 24A The 1998 Rudy A. Biglione Revocable Trust Case No. 16CEPR00483

#### Page 3

**Petitioner states** Jo responded in March 2016 and provided her attorney's time records to support request for reimbursement of fees paid or services allegedly performed related to trust administration tasks only. However, the records appeared to include substantial time assisting Jo in her individual capacity associated with Jo's efforts to purchase the house and obtain reimbursement for items not authorized by the trust. Otherwise the account was not amended or revised in any way.

As a proximate result of Jo's breach of fiduciary duties, Ruth has incurred substantial attorney's fees, and distribution has been delayed nearly two years beyond what is permitted by the terms of the trust.

#### Petitioner requests that:

- 1. Jo be compelled to redress her breach of her fiduciary duties by payment of money damages according to proof, including interest as appropriate;
- 2. Jo be removed from office;
- 3. The Court order that Jo not receive compensation from the trust for her administration;
- 4. The Court order that Jo be reimbursed only for those attorney's fees incurred for proper trust administration tasks and not for services associated with her own personal interest in pursuing purchase of the residence; and
- 5. Such other and further orders as the Court deems proper.

# The 1998 Rudy A. Biglione Revocable Trust Case No. 16CEPR00483

Attorney Lind, Ruth P. (for Petitioner Josephine M. Kirk)
Attorney Amador, Catherine A. (for Objector Ruth Jacobsen)

First and Final Account, Petition for Settlement of Account and Approval of Trustee and Attorney Fees and for Distribution

	Afforney rees and for Distribution				
סמ	D: 1/17/14	JOSEPHONE M. KIRK, Trustee, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:		
		Petitioner states this petition is reasonably necessary for	COMMENTS:		
		the protection of the interest of the trustee and	SEE ADDITIONAL		
		beneficiaries and because one of the beneficiaries,	PAGES		
		RUTH JACOBSEN, has raised issues with the trustee's	TAGES		
	Aff.Sub.Wit.	administration and amounts Jacobsen wanted the trust			
_	Verified	to pay to her. Without approval of the Court, the trustee			
		would be required to hold back substantial funds from			
	Inventory	distribution to cover potential litigation costs. By means of			
	PTC	this petition, the trustee seeks timely determination of all			
	Not.Cred.	matters presented in this account so that other			
	Notice of	beneficiaries may receive distributions without lengthy			
	Hrg	delay.			
~	Aff.Mail	<u> </u>			
	Aff.Pub.	Account period: 1/17/14 – 12/28/15			
	Sp.Ntc.	Accounting: \$214,815.53			
	Pers.Serv.	Beginning POH: \$209,809.65 Ending POH: \$172,502.20 (cash)			
	Conf.	= Litaling ( Ott. \$172,302.20 (Cash)			
	Screen	Preliminary distributions: Beneficiary Joyce A. Brenden			
	Letters	received \$20,000.00.			
	Duties/Supp	= 10001/04 \$20,0001001			
-		<b>Trustee: \$1,950.00</b> (for 78 hours @ \$25/hr for the care and			
	Objections	custody of trust assets, sale of the real property,			
	Video	preparation of accounting, and other administration			
	Receipt	tasks, per itemization at Attachment D, not including			
	CI Report	hours and expenses to borrow funds to purchase.)			
	9202	<u></u>			
~	Order	Trustee (Reimburse expenses): \$23,285.75 (per Schedule			
	Aff. Posting	E, for last expenses, maintenance and preservation of	Reviewed by: skc		
	Status Rpt	residence, County Clerk, and \$15,471 paid to Attorney	Reviewed on:		
		Lind)	6/14/16		
	UCCJEA	Attorney Lind: \$18,812.50, less \$15,471.00 received,	Updates:		
	Citation	Balance: \$3,341.50 (for services including being available	Recommendation:		
	FTB Notice	to Petitioner during the account period for legal services	File 24B- Biglione		
		in connection with the trust administration, preparation of			
		this petition, etc. See declaration filed 5/26/16.)			
		Reserve: \$2,000.00 (for tax prep, closing expenses)			
		SEE ADDITIONAL PAGES			

#### 24B The 1998 Rudy A. Biglione Revocable Trust Case No. 16CEPR00483

#### Page 2

**Petitioner states** the only asset in the trust other than the accounts of \$7,809.05 was the residence shared by the decedent and Petitioner for 16 ears. During that 16 year period, Petitioner cared for the decedent, including, but not limited to: shopping for special nutrition and personal care items, transportation to medical appointments, hairdresser, shopping and other trips desired by Ms. Biglione, preparation of special meals (3 meals and 2 snacks per day – mother on special diet), administration of medication and eyedrops (mother was legally blind), help shower and dressing, laundry, taking her to church until she was unable to go because of incontinence, assistance with preparation for bed and snacks, and care of concentrator.

After the decedent's death, Petitioner continued living in the home. She handed Jacobsen a copy of the trust but Jacobsen would not take it because she said she wanted the will. Even though the other beneficiaries visited the home from time to time, Jacobsen did not offer to help or discuss with Petitioner the terms of the trust or administration. Petitioner requested help going through personal property, but Jacobsen said she was not interested in the assets. Jacobsen asked about the house on the day of the funeral, and Petitioner told her she was not prepared to move because their mother had just died. Petitioner states Jacobsen told her she had two years to decide.

Petitioner was grieving the loss of her mother. They had been very close and she had cared for her for the last 16 years. Petitioner also had health problems and was facing surgery. She was not aware that there were legal requirements and that she should contact her mother's attorney. She believed Jacobsen had given her two years to continue living in the house before making a decision.

Petitioner states she was blindsided when her attorney received a letter from Jacobsen's attorney threatening her with breach of fiduciary duty if she did not pay rent or purchase the house from her siblings. Petitioner and her sister Joyce attempted to obtain a long to purchase their interest in the house. Jacobsen's attorney said there was no objection to Petitioner's continuing to reside there or paying rent to the other two siblings. A loan could not be obtained; therefore, Petitioner sold the house and put the proceeds in the trust. Petitioner retained Attorney Lind to assist her with her duties under the trust.

**Proposed Distribution:** \$173,266.45 cash distributable (POH: \$172,502.20, less \$2,000.00 reserve, plus \$8,000.00 rent receivable (\$4,000 each from Jo and Joyce), less amounts payable to Petitioner (\$23,285.75 and \$1,950.00), plus \$20,000.00 advance distribution to Joyce)

Josephine Kirk: \$64,552.36 (\$43,316.61 plus advances, trustee fees, less rent)

Ruth Jacobsen: \$43,316.61

Joyce A. Brenden: \$19,316.61 (\$43,316.61 less preliminary distribution, rent)

Christian M. Petersen: \$43,316.61

#### **SEE ADDITIONAL PAGES**

#### 24B The 1998 Rudy A. Biglione Revocable Trust Case No. 16CEPR00483

#### Page 3

#### Petitioner respectfully requests an Order that:

- 1. All facts stated in the petition are true and that all notices required by law have been given;
- 2. This account and report be settled, allowed, and approved, and all acts and transactions of Petitioner set forth in it or relating to matters set forth in it be ratified, confirmed, and approved;
- 3. Petitioner and her attorney be allowed the requested compensation for their services;
- 4. Petitioner be authorized to withhold \$2,000 as reserve for closing expenses and accounting services:
- 5. Petitioner be authorized to distribute assets as set forth in Attachment F; and
- 6. Such other and further orders be made as the Court deems just and proper under the circumstances.

See also Declaration of Ruth Lind filed 5/26/16. Declaration details attorney fees requested and states the performance of legal services by the trustee's attorney were reasonably necessary to safeguard the welfare and best interests of the beneficiaries and the trust estate. Although Jacobsen had told Kirk the day of the funeral that she would have two years to decide what she wanted to do about the house, she denied it once her attorney was involved. This led to threats of removal from office and demands for money, which Jacobsen knew were impossible because Kirk had to advance funds to pay for funeral expenses and debts due. Jacobsen did not seem to understand that Kirk owed a fiduciary duty to all beneficiaries. Although Jacobsen was not the trustee, she kept demanding that Kirk pay her unreasonably large sums of money to avoid court action to charge her with break of fiduciary duties and remove her as trustee.

Objection filed 6/8/16 by Ruth Jacobsen states she objects to the accounting filed 5/11/16 on the grounds that Petitioner breached her fiduciary duties.

<u>Examiner's Note</u>: Objection appears to restate the allegations set forth in her Petition for Relief from Breach of Trust at Page A and does not appear to address this accounting specifically; therefore, it is not summarized here.

#### 24B The 1998 Rudy A. Biglione Revocable Trust Case No. 16CEPR00483

Page 4

#### NEEDS/PROBLEMS/COMMENTS:

- 1. Debra Lee Scheidt, granddaughter, is named as second successor trustee and is therefore entitled to notice pursuant to Probate Code §17203. Need continuance for proper notice to Ms. Scheidt or waiver of notice.
- 2. The accounting does not appear to be in compliance with Probate Code §1062 (schedules).
- 3. Need clarification: Attorney Lind's declaration filed 5/26/16 and proposed order do not correspond to the attorney fees requested in the petition.

Paragraph 7 on Page 4 of the petition requests \$18,812.50, less \$15,471.00 already paid (requested to be reimbursed to Petitioner as part of the \$23,285.75), resulting in a balance due of \$3,341.50.

However, the declaration indicates a total fee of \$18,887.50 (see Page 5) and payments totaling \$15,837.25 (see attached billing), which appears to result in a balance due to the attorney of \$3,050.25 plus a balance due to Petitioner of 366.25.

Also however, the proposed order indicates approval of \$18,937.50 and payments totaling \$15,521.00, resulting in a balance due to Attorney Lind of \$3,216.50 (stated in the order, although Examiner calculates \$3,416.50 with these figures, plus a balance due to Petitioner of \$50.00).

4. The proposed distribution to beneficiaries does not appear to take into account the balance requested to be paid to Attorney Lind (subject to clarification above). If granted, need revised proposed distribution and proper notice thereof to all beneficiaries. Petitioner James Calvin Bussey, Jr. (Pro Per, son)

# Petition for Letters of Administration; Authorization to Administer Under the IAEA with Full Authority

DOD: 9/18/2014			JAMES CALVIN BUSSEY, JR., son, is	NEEDS/PROBLEMS/COMMENTS:
			Petitioner and requests appointment as Administrator without bond.	Need Confidential     Supplement to Duties and     Liabilities of Personal
Cont. from				Representative form, pursuant
	Aff.Sub.Wit.		Full IAEA — OK	to Local Rule 7.10.1 and
✓	Verified			Probate Code § 8404.
	Inventory			2. Item 5(a)(2)(b) of the Petition
	PTC		Decedent died intestate.	states Decedent's spouse is
	Not.Cred.			deceased. Item 8 of the
✓	Notice of Hrg		Residence — Fresno Publication — Business Journal	Petition does not include the name and date of death of deceased spouse pursuant to
✓	Aff.Mail	W/	TODIICATION — Bosiness Joonnal	Local Rule 7.1.1(D).
✓	Aff.Pub.			Note: If the Petition is granted,
	Sp.Ntc.		Estimated value of the Estate:	Court will set status hearings as
	Pers.Serv.		De al lavara anti-	follows:
	Conf. Screen		Real property - \$12,533.00 (encumbered)	Wednesday, November 16,
✓	Letters		Total - \$12,533.00	2016 at 9:00 a.m. in Dept. 303 for filing of inventory and
✓	Duties/Supp	X(supp)		appraisal; and
	Objections			Wednesday, August 16, 2017
	Video		Probate Referee: Steven Diebert	at 9:00 a.m. in Dept. 303 for
	Receipt			filing of first account and/or
	CI Report			petition for final distribution.
	9202			Pursuant Local Pulo 7.5 if the
✓	Order			Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.
	Aff. Posting			Reviewed by: LEG
	Status Rpt			Reviewed on: 6/14/16
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 25- Barker
				25

## 26 Mileena Padilla, Melody Padilla (GUARD/P)

Case No. 16CEPR00583

Petitioner: Frank Javier Rios (Pro per – Maternal grandfather)
Petitioner: Diana Rios (Pro per – Maternal grandmother)

#### Petition for Appointment of Temporary Guardian of the Person

	GENERAL HEARING 8/3/2016	NEEDS/PROBLEMS/COMMENTS:
		· ·
	FRANK JAVIER RIOS and DIANA RIOS,	1. Need Notice of Hearing.
	maternal grandparents, are petitioners	2. Item 9b of petition requests to be
Cont. from		be excused from having to give
Aff.Sub.Wit.		notice to Moises Padilla (father).  Need proof of personal service of
✓ Verified		Notice of Hearing with copy of
Inventory	See petition for details.	petition at least 5 court days
PTC	=	before hearing <u>or</u> consents and
Not.Cred.	=	waivers of notice or declarations
Notice of X	=	of due diligence for: a. Moises Padilla (father) –
Hrg		unless court dispenses
Aff.Mail		with notice
Aff.Pub.		b. Frankie Rios (mother)
Sp.Ntc.		
Pers.Serv. X		
✓ Conf.	1	
Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202	4	
✓ Order		
Aff. Posting		Reviewed by: SEF
Status Rpt		<b>Reviewed on:</b> 6/14/2016
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 26- Padilla

## Francisco De La Mora, JR (CONS/PE) Case No. 15CEPR00758

Attorney Kruthers, Heather H (for Public Guardian)

Ex Parte Petition for Authorization for the Conservator to Spend More Than Co-Payment for an Evaluation

			PUBLIC GUARDIAN, Conservator of the	NEEDS/PROBLEMS/COMMENTS:
			Person and Estate, is petitioner.	
			· '	1. Need Order.
			Please see petition for details	
	nt. from			
	Aff.Sub.Wit.			
	Verified			
✓				
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of			
	Hrg			
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
	Order	Χ		
	Aff. Posting			Reviewed by: LV
	Status Rpt			Reviewed on: 06/14/2016
	UCCJEA			Updates: Recommendation:
	Citation ETP Notice			
	FTB Notice			File 27- De La Mora